

University of La Verne

2020-2021 Assets & Investments Information

Office of Financial Aid | 1950 Third Street | La Verne, CA 91750 | Phone: (800) 649-0160 | Fax: (909) 448-1629

You are required to fill out this form because you indicated you, your spouse (independent student) and/or your parents (dependent students) have assets or investments. If you or your parents are divorced or separated and you or your parents had jointly owned assets, report only your or your parents' portion. **If a section does not pertain to you, please indicate zero or not applicable (NA). We cannot process your financial aid until you submit all the required verification documents. You may view all outstanding requirements on your My La Verne portal. Failure to complete the verification process in a timely manner may result in the loss of aid.**

STUDENT INFORMATION

Last Name

First Name

La Verne ID Number

ASSETS

Please list assets as of FAFSA filing date. Do not include current balance.

	Student/Spouse	Parents
Cash	\$ _____	\$ _____
Savings	\$ _____	\$ _____
Checking Accounts	\$ _____	\$ _____

REAL ESTATE INVESTMENTS

Investments include real estate (do not include the home in which you live).

List the net worth of all real estate you own, including rental property, land, vacation homes, second homes, timeshares, or multi-family dwellings you may own as of the FAFSA filing.

Address	Net Worth*
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Net worth means the current value, as of today, of investments, businesses, and/or investment farms, minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use 0 for investments or properties with a negative value.

La Verne ID Number _____

NET WORTH INVESTMENTS

Investments also include qualified educational benefits or education savings accounts (e.g., Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). For a student who does not report parental information, the accounts owned by the student (and/or the student’s spouse) are reported as student investments. For a student who must report parental information, the accounts are reported as parental investments, including all accounts owned by the student and all accounts owned by the parents for any member of the household.

To find the net worth subtract the debt from the value of the investment as of the FAFSA filing date. **Do not include** the value of life insurance, retirement plans (401(k), pensions, annuities, non-education IRAs, Keogh plans, etc.)

	Student/Spouse	Parents
Bonds, Trust Funds, Partnerships	\$ _____	\$ _____
Mutual Funds, Stocks and Other Securities	\$ _____	\$ _____
Certificates of Deposits, Money Market Accounts	\$ _____	\$ _____
Commodities/Precious Metals, Corporation (value of your portion)	\$ _____	\$ _____
Installment of land sale contracts including mortgages held	\$ _____	\$ _____
Coverdell Education Savings Plans (owned by parent or student)	\$ _____	\$ _____
529 Education Savings Plans (owned by parent or student)	\$ _____	\$ _____
Other investments owned	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____

Comments regarding your or your parents assets:

CERTIFICATION AND SIGNATURES

By signing this form, I affirm that all information on this form and any attachments are complete and accurate to the best of my knowledge. I understand that any false statements or misrepresentation may be cause for denial, reduction, withdrawal, and/or repayment of financial aid, and I may be subject to a fine, imprisonment or both, under provisions of the United States criminal code.

Please note: a “wet” (physical) signature is required.

Student _____ Date _____

Parent* _____ Date _____

**For dependent students only*